



GEARS

General Enterprise And Resource Support

**REP300-INV
Inventory Reports**

June 12, 2013

Table of Contents

REP300.....	1
REP300 Accessing GEARS Reports.....	1
Lesson 6: INV Reports	1
6.1 Using Inventory Balances Report	1
6.2 Using Issue History Reports	8
6.3 Using the Transaction Register	15

REP300

REP300 Accessing GEARS Reports

Lesson 6: INV Reports

Lesson Overview

This course will review the process for generating the appropriate Inventory reports in GEARS.

6.1 Using Inventory Balances Report

This topic will describe the delivered GEARS Inventory Balances Report.

After completing this topic, you will be able to:

- Use and navigate the Inventory Balances Report

Procedure

In this topic, you will learn how to use and navigate the Inventory Balances Report.


This report is a standard report which is delivered by Oracle. Some columns on the report output refer to PeopleSoft features that do not relate to the Judiciary. Those columns will always be blank on the report. For example, the Judiciary is not using the reservation process. For that reason, all columns related to reservations will be blank.

This report can be run for a single item or for all items that are in stock. It is a good way to see the On-Hand balances for inventory items at a specific point in time.

The report does not show any inventory transactions and is only designed to show the On-Hand Balances at the time when the report is run.



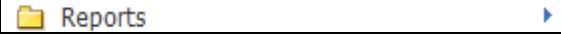
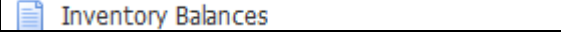
This report is a good candidate to be scheduled to run at a specific time every month. For example, it could be run during the night of the last day of every month. If the Judiciary decides to schedule the report, that effort should be coordinated with the system DBA. Transactional details are retained in PeopleSoft even if this report is not run.

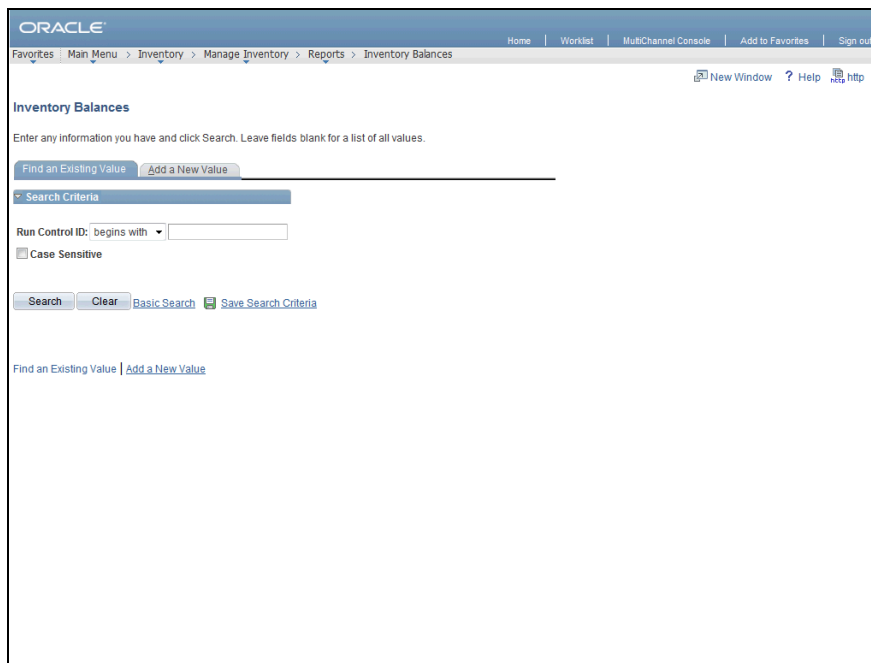
The report can be retained either electronically or as a printed report.

Step	Action
1.	<p>Begin by navigating to the Inventory Balances page.</p> <p>Click the Main Menu button.</p> 

Training Guide

Inventory Reports

Step	Action
2.	Click the Inventory menu. 
3.	Click the Manage Inventory menu. 
4.	Click the Reports menu. 
5.	Click the Inventory Balances menu. 



ORACLE

Home | Worklist | MultiChannel Console | Add to Favorites | Sign out

Favorites | Main Menu > Inventory > Manage Inventory > Reports > Inventory Balances

Inventory Balances

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value | Add a New Value

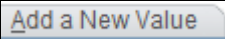
Search Criteria

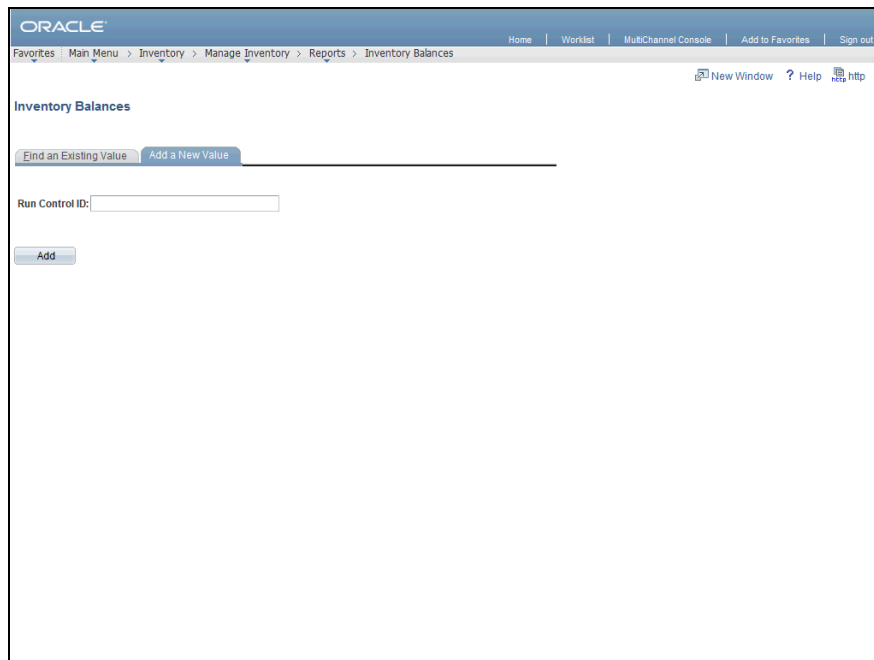
Run Control ID: begins with

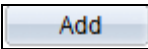
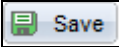
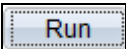
Case Sensitive

Search | Clear | Basic Search | Save Search Criteria

Find an Existing Value | Add a New Value

Step	Action
6.	The Inventory Balances search page displays. Click the Add a New Value tab. 



Step	Action
7.	Enter the desired information into the Run Control ID field. Enter " TEST ".
8.	Click the Add button. 
9.	<p>Verify that the Unit field displays "MDJUD".</p> <p>This report can be run for a single item or for all items in stock based upon the selection made with the radio buttons on the Run Control page. If you select the Single Item radio button, you will also enter the specific Item ID that you want to report against.</p> <p>You should always select the Business Unit Level Balances and Storage Location Balances check boxes. You should never check any of the other boxes on this page because they relate to features that are not being used at the Judiciary.</p>
10.	<p>In the Balance Reports section, verify that the following options are selected:</p> <ul style="list-style-type: none"> - Business Unit Level Balances - Storage Location Balances
11.	Click the Save button. 
12.	Click the Run button. 

Training Guide

Inventory Reports

ORACLE

Home | Worklist | MultiChannel Console | Add to Favorites | Sign out

Favorites | Main Menu > Inventory > Manage Inventory > Reports > Inventory Balances

New Window ? Help Personalize Page http

Process Scheduler Request

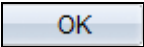
User ID: neil.shahi Run Control ID: TEST

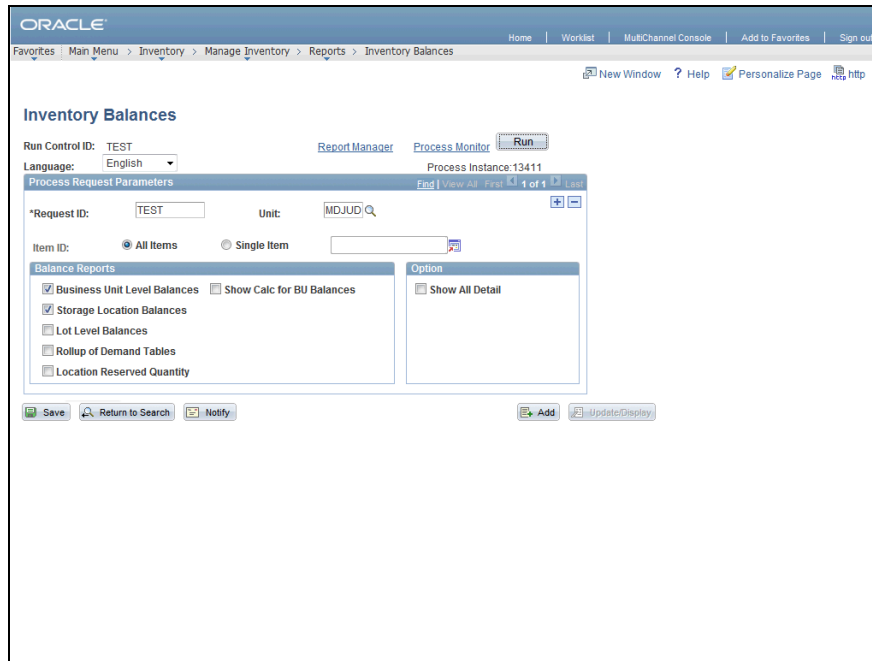
Server Name: Run Date:

Recurrence: Run Time:

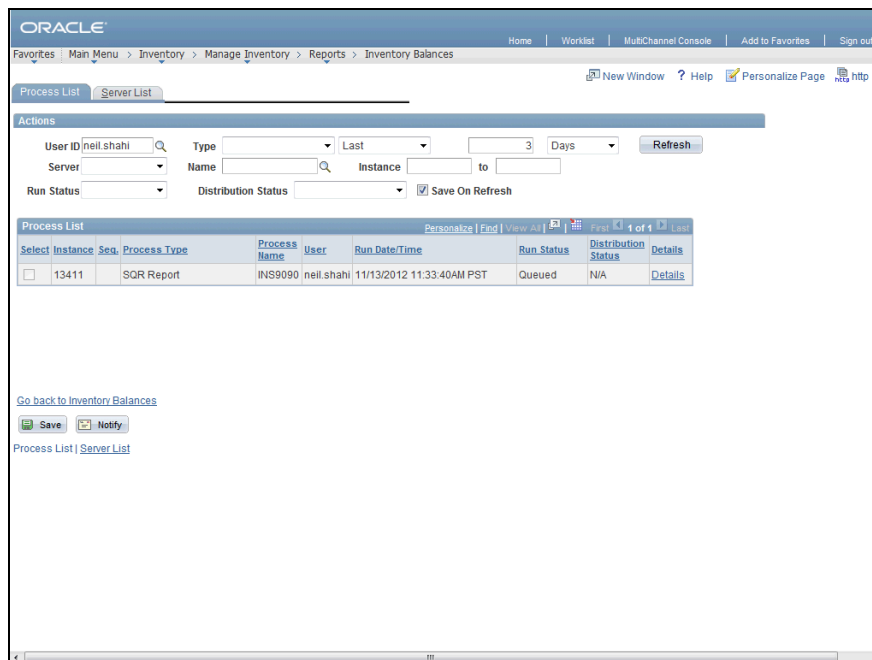
Time Zone:

Select	Description	Process Name	Process Type	Type	Format	Distribution
<input checked="" type="checkbox"/>	IN Balance Reports	INS9090	SQR Report	Web	PDF	Distribution

Step	Action
13.	The Process Scheduler Request page displays. Verify that the Server Name field displays "PSUNX".
14.	Click the OK button. 
15.	Take note of the Process Instance number. For example, 13411.

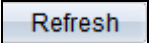



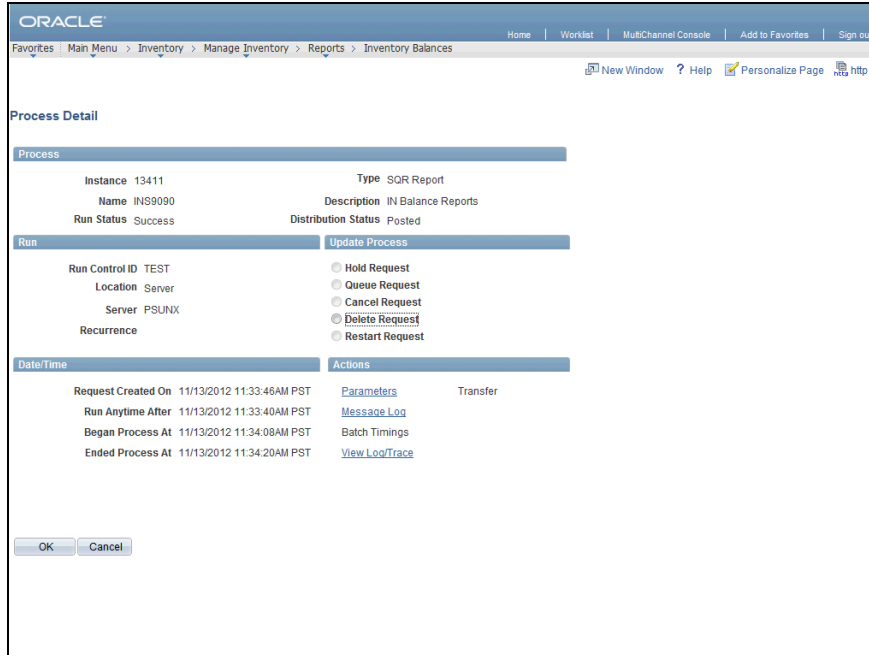
Step	Action
16.	Click the Process Monitor link. Process Monitor



Select	Instance	Seq	Process Type	Process Name	User	Run Date/Time	Run Status	Distribution Status	Details
<input type="checkbox"/>	13411	1	SQR Report	INS9090	neil.shahi	11/13/2012 11:33:40AM PST	Queued	N/A	Details

Training Guide Inventory Reports

Step	Action
17.	Click the Refresh button until the Run Status is "Success" and the Distribution Status is "Posted" for the process you just ran. 
18.	Click the Details link. 



ORACLE

Home | Worklist | MultiChannel Console | Add to Favorites | Sign out

Favorites | Main Menu > Inventory > Manage Inventory > Reports > Inventory Balances

New Window ? Help Personalize Page http

Process Detail

Process

Instance 13411 Type SQR Report
Name INS9090 Description IN Balance Reports
Run Status Success Distribution Status Posted

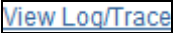
Run **Update Process**

Run Control ID TEST ☐ Hold Request
Location Server ☐ Queue Request
Server PSUNIX ☐ Cancel Request
Recurrence ☐ Delete Request
☐ Restart Request


Date/Time **Actions**

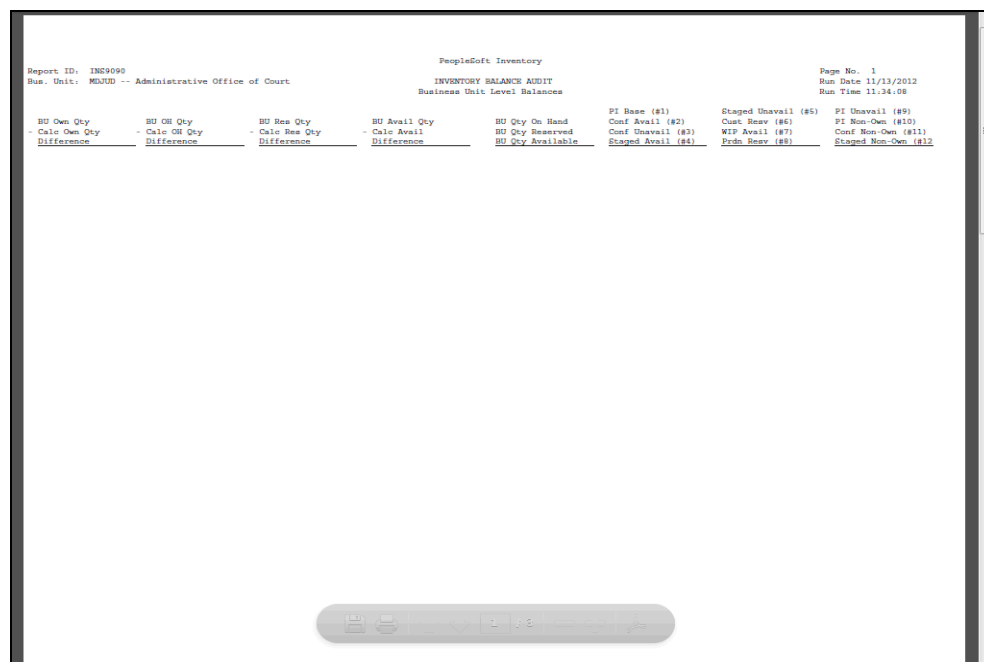
Request Created On 11/13/2012 11:33:46AM PST [Parameters](#) Transfer
Run Anytime After 11/13/2012 11:33:40AM PST [Message Log](#)
Began Process At 11/13/2012 11:34:08AM PST [Batch Timings](#)
Ended Process At 11/13/2012 11:34:20AM PST [View Log/Trace](#)

OK Cancel

Step	Action
19.	Click the View Log/Trace link. 



Step	Action
20.	Click the PDF link to open the Inventory Balances report. 



Step	Action
21.	<p>The PDF report output will show the inventory quantity balances of all items in the warehouse.</p> <p>As indicated earlier in this document, many columns on this report will be blank because they refer to features in the system that are not being used at the Judiciary.</p>
22.	<p>You have successfully completed the <i>Using Inventory Balances Report</i> topic.</p> <p>You have learned how to:</p> <ul style="list-style-type: none"> - Use and navigate to the Inventory Balances Report <p>End of Procedure.</p>

6.2 Using Issue History Reports

This topic will describe how to access the Issues History Report.

After completing this topic, you will be able to:

- Use and navigate the Issues History Report

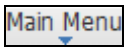

Procedure

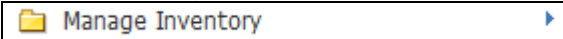

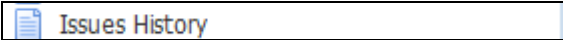
In this topic you will learn how to use and navigate the Issues History report.

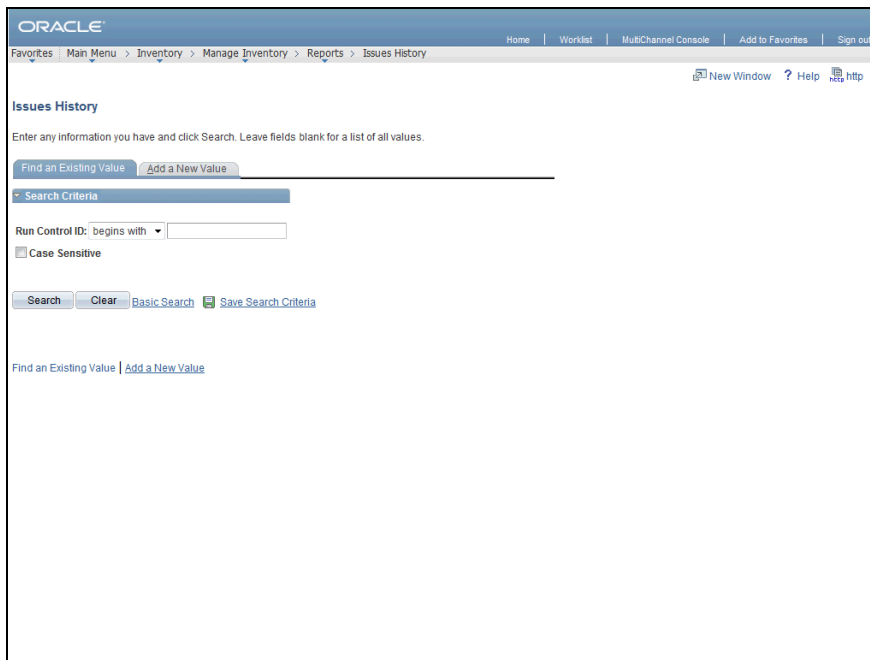
The Issues History report is a standard report delivered in PeopleSoft by Oracle. It is the report equivalent of the on-line Transaction History Page. The advantage of the report is that it can show issue transaction data for more than one item at a time.

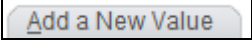
This report is a good candidate to be scheduled to run at a specific time every month. For example, it could be run during the night of the last day of every month. If the Judiciary decides to schedule the report, that effort should be coordinated with the system DBA.

It also allows you to retain an electronic or paper copy of the report for audit purposes.

Step	Action
1.	<p>Begin by navigating to the Issues History page.</p> <p>Click the Main Menu button.</p> 
2.	<p>Click the Inventory menu.</p> 

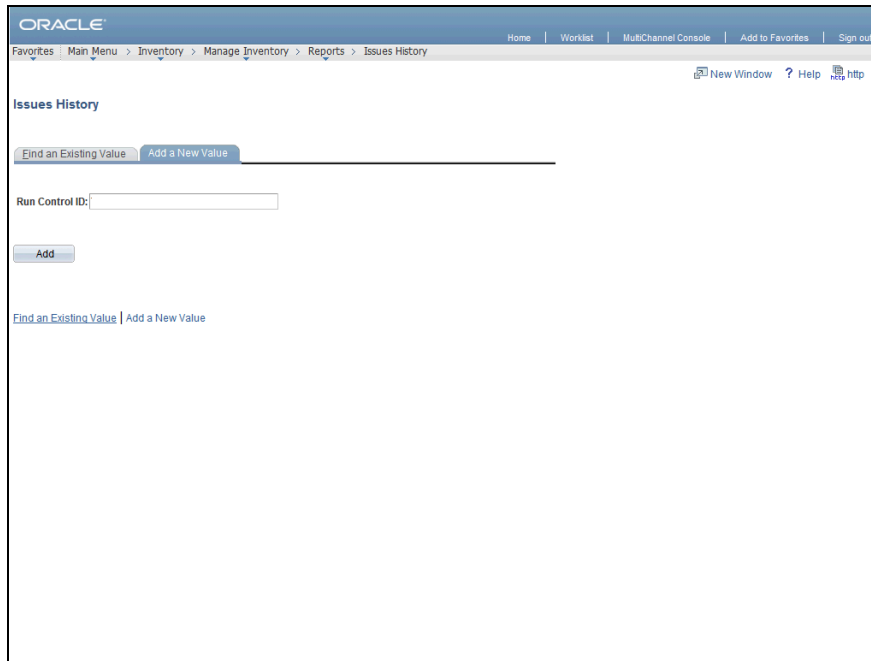
Step	Action
3.	Click the Manage Inventory menu. 
4.	Click the Reports menu. 
5.	Click the Issues History menu. 

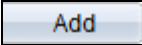


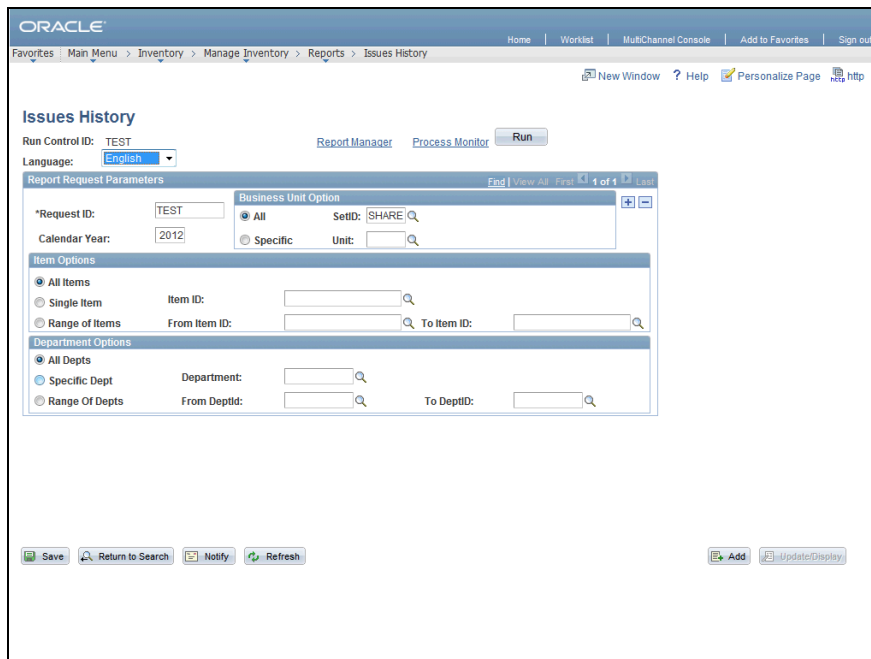
Step	Action
6.	The Issues History search page displays. Click the Add a New Value tab. 

Training Guide

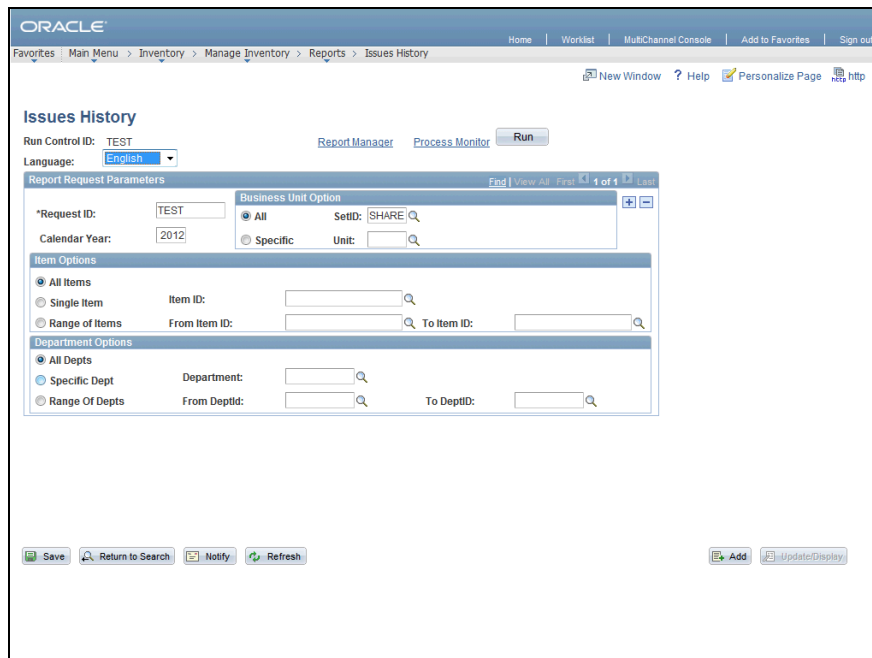
Inventory Reports

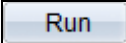


Step	Action
7.	Enter the desired information into the Run Control ID field. Enter " TEST ".
8.	Click the Add button. 



Step	Action
9.	<p>The Issues History page displays.</p> <p>For this example, accept all run control defaults.</p> <p>The Judiciary has only one Inventory Business Unit so you should always click the All Radio Button in the Business Unit Options area.</p> <p>If you plan to run the report on a pre-defined schedule every month, you should check the All Items Radio Button. If you are running the report in an ad-hoc mode, you should select the radio buttons that are appropriate for your particular needs.</p> <p>Under the Department Options section, you will always check the All Depts Radio Button.</p>



Step	Action
10.	<p>Click the Run button.</p> 
11.	<p>The Process Scheduler Request page displays.</p> <p>Verify that the Server Name filed displays "PSUNX".</p>

Training Guide Inventory Reports

ORACLE

Home | Worklist | MultiChannel Console | Add to Favorites | Sign out

Favorites | Main Menu > Inventory > Manage Inventory > Reports > Issues History

New Window ? Help Personalize Page http

Process Scheduler Request

User ID: neil.shahi Run Control ID: TEST

Server Name: **PSUNX** Run Date: 11/13/2012
 Recurrence: Run Time: 1:49:36PM
 Time Zone:

Process Request Dialog

Reset to Current Date/Time

Select	Description	Process Name	Process Type	*Type	*Format	Distribution
<input checked="" type="checkbox"/>	IN Issue History	INS7150	SQR Report	Web	PDF	Distribution

OK Cancel Refresh

Step	Action
12.	Click the OK button. <div>OK</div>

ORACLE

Home | Worklist | MultiChannel Console | Add to Favorites | Sign out

Favorites | Main Menu > Inventory > Manage Inventory > Reports > Issues History

New Window ? Help Personalize Page http

Issues History

Run Control ID: TEST Report Manager Process Monitor Run

Language: English Process Instance: 13440

Report Request Parameters

*Request ID: TEST Business Unit Option: All SetID: SHARE
 Calendar Year: 2012 Specific Unit:

Item Options

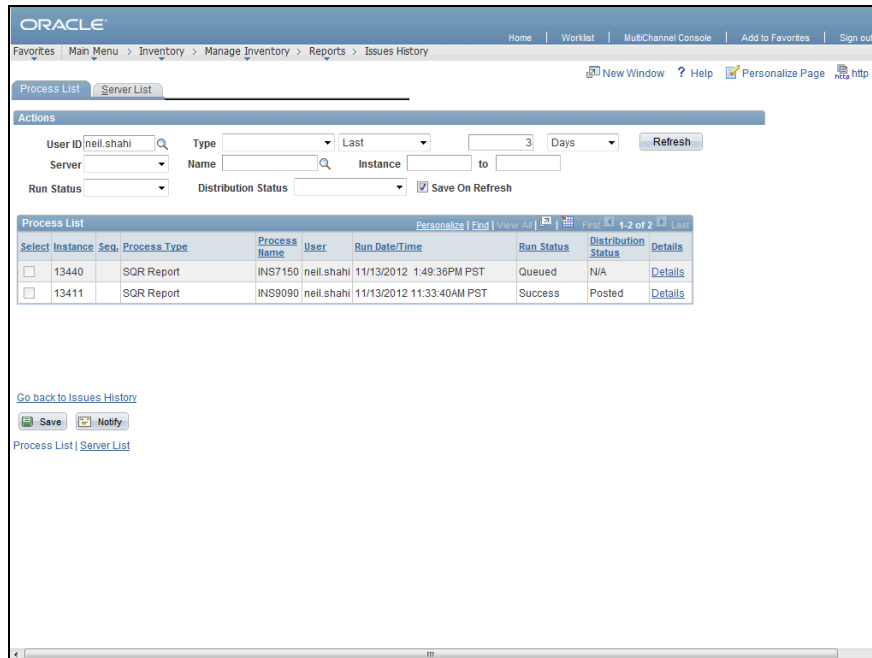
All Items Single Item Item ID:
 Range of Items From Item ID: To Item ID:

Department Options

All Depts Department:
 Range Of Depts From DeptId: To DeptId:

Save Return to Search Notify Refresh Add Update/Display

Step	Action
13.	Take note of the Process Instance number. For example, 13440.
14.	Click the Process Monitor link. Process Monitor



The screenshot shows the Oracle Process Monitor interface. At the top, there's a navigation bar with 'Home', 'Worklist', 'MultiChannel Console', 'Add to Favorites', and 'Sign out'. Below this is a breadcrumb trail: 'Favorites > Main Menu > Inventory > Manage Inventory > Reports > Issues History'. The main area has tabs for 'Process List' and 'Server List'. Under 'Process List', there's an 'Actions' section with filters for 'User ID' (neil.shahi), 'Type', 'Last' (3 Days), 'Server', 'Name', 'Instance', 'Run Status', and 'Distribution Status'. A 'Refresh' button is present. Below the filters is a table with the following data:

Select	Instance	Sea	Process Type	Process Name	User	Run Date/Time	Run Status	Distribution Status	Details
<input type="checkbox"/>	13440		SQR Report	INS7150	neil.shahi	11/13/2012 1:49:36PM PST	Queued	N/A	Details
<input type="checkbox"/>	13411		SQR Report	INS9090	neil.shahi	11/13/2012 11:33:40AM PST	Success	Posted	Details

Below the table, there are links for 'Go back to Issues History', 'Save', and 'Notify'. At the bottom, there are tabs for 'Process List' and 'Server List'.

Step	Action
15.	Click the Refresh button until the Run Status is "Success" and the Distribution Status is "Posted" for the process you just ran. Refresh
16.	Click the Details link. Details

Training Guide

Inventory Reports

ORACLE

Home | Worklist | MultiChannel Console | Add to Favorites | Sign out

Favorites | Main Menu > Inventory > Manage Inventory > Reports > Issues History

New Window ? Help Personalize Page http

Process Detail

Process	
Instance	13440
Type	SQR Report
Name	INS7150
Description	IN Issue History
Run Status	Success
Distribution Status	Posted

Run	Update Process
Run Control ID TEST	<input type="radio"/> Hold Request <input type="radio"/> Queue Request <input type="radio"/> Cancel Request <input type="radio"/> Delete Request <input type="radio"/> Restart Request
Location Server	
Server PSUNIX	
Recurrence	

Date/Time	Actions
Request Created On 11/13/2012 1:49:41PM PST	Parameters Transfer
Run Anytime After 11/13/2012 1:49:36PM PST	Message Log
Began Process At 11/13/2012 1:49:49PM PST	Batch Timings
Ended Process At 11/13/2012 1:50:03PM PST	View Log/Trace

OK Cancel

Step	Action
17.	Click the View Log/Trace link. <u>View Log/Trace</u>

ORACLE

Home | Worklist | MultiChannel Console | Add to Favorites | Sign out

Favorites | Main Menu > Inventory > Manage Inventory > Reports > Issues History

New Window ? Help Personalize Page http

View Log/Trace

Report	
Report ID: 10014	Process Instance: 13440 Message Log
Name: INS7150	Process Type: SQR Report
Run Status: Success	

IN Issue History

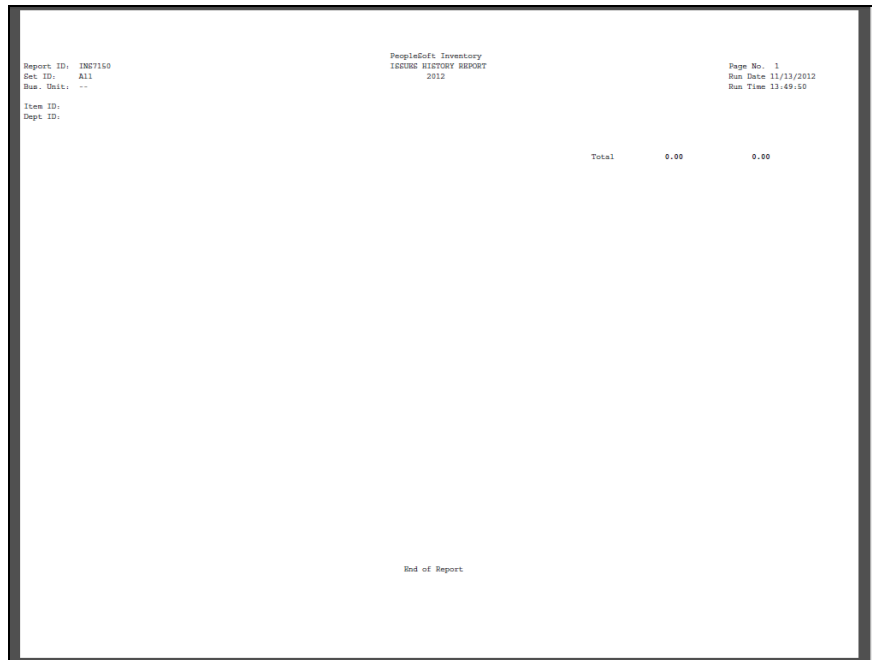
Distribution Details	
Distribution Node: PSUNIX	Expiration Date: 11/20/2012

File List		
Name	File Size (bytes)	Datetime Created
SQR_INS7150_13440.log	1,501	11/13/2012 1:50:03.710447PM PST
ins7150_13440.PDF	1,498	11/13/2012 1:50:03.710447PM PST
ins7150_13440.out	0	11/13/2012 1:50:03.710447PM PST

Distribute To	
Distribution ID Type	Distribution ID
User	neil.shahi

Return

Step	Action
18.	Click the PDF link to view the report output. ins7150_13440.PDF



Step	Action
19.	The Issues History Report opens in a new window. Click the Close Tab (Ctrl+W) button in the browser to close the report.
20.	You have successfully completed the <i>Using Issue History Reports</i> topic. You have learned how to: - Use and navigate the Issues History report End of Procedure.

6.3 Using the Transaction Register

GEARS provides several methods that can be used to review transaction history. This topic will describe how to access the report that was designed for that purpose.

After completing this topic, you will be able to:

- Use and navigate the Transaction Register to produce a report



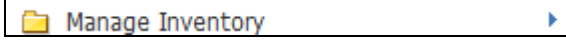
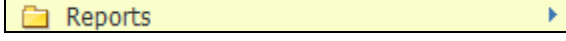
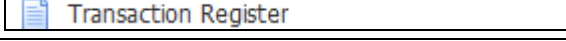
Procedure

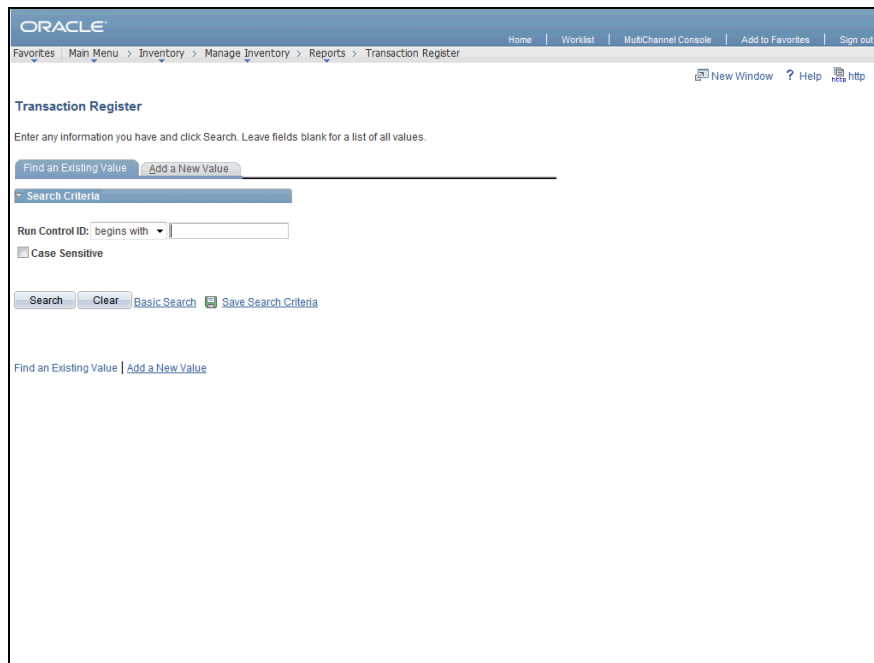
In this topic, you will learn how to use and navigate the Transaction Register to produce a report.

The Transaction Register is a standard report which is delivered by Oracle. It is potentially the most comprehensive and useful report because it shows all the transaction types that can be entered into GEARS.

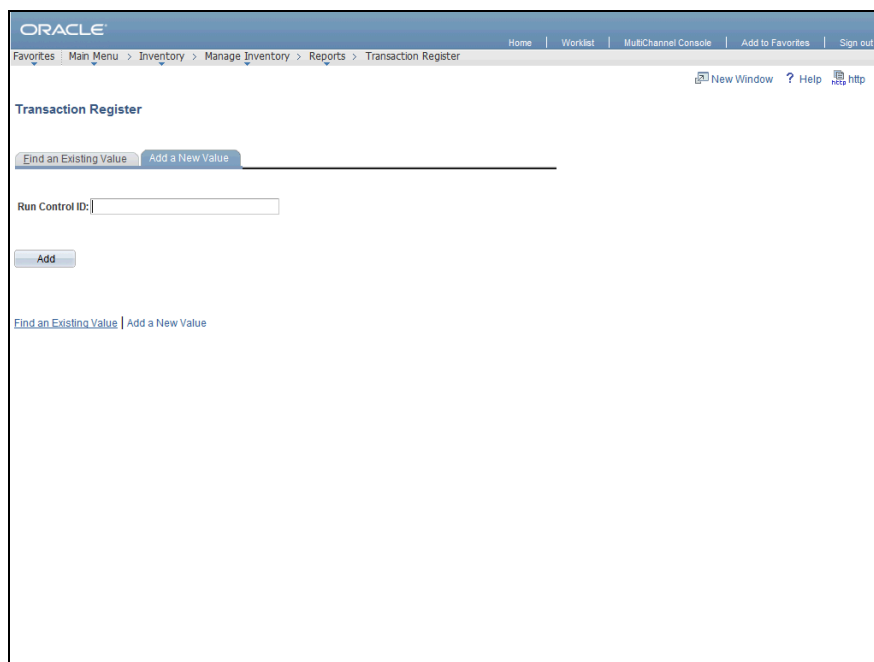
At the Judiciary, only four transactions are likely to be used initially; Putaway, Issue, Adjustment Up and Adjustment Down. Other transactions could be included in the future if additional functionality begins to be used.

The report can be run in an ad-hoc mode but can also be scheduled to run on some predefined schedule. This report does not function as a scheduled report as well as other standard reports because there is no way to dynamically modify the run control parameters.

Step	Action
1.	Begin by navigating to the Transaction Register page. Click the Main Menu button. 
2.	Click the Inventory menu. 
3.	Click the Manage Inventory menu. 
4.	Click the Reports menu. 
5.	Click the Transaction Register menu. 

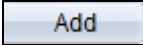


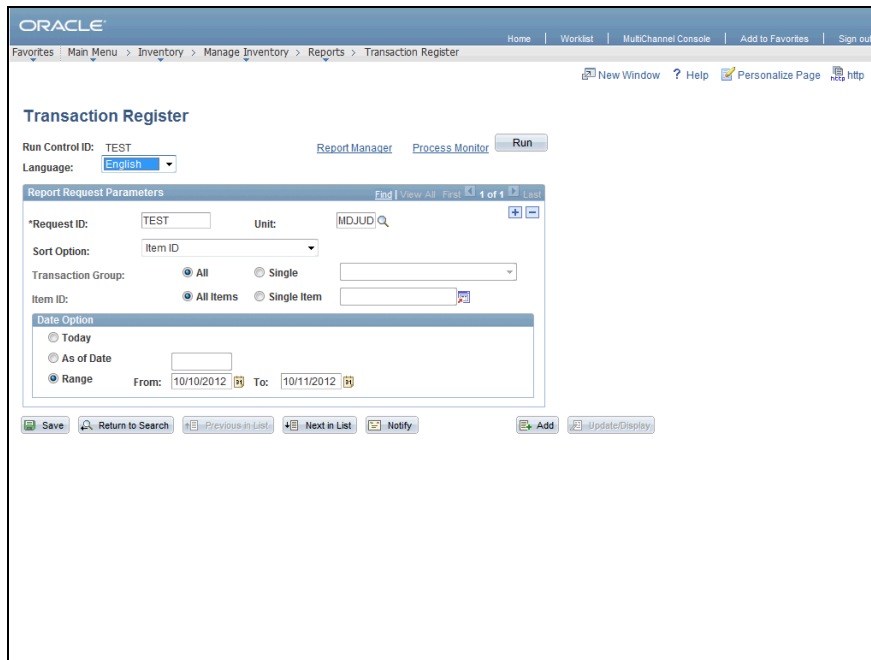
Step	Action
6.	Click the Add a New Value tab. <div>Add a New Value</div>



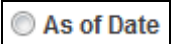
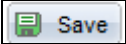
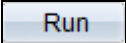
Training Guide

Inventory Reports

Step	Action
7.	Enter the desired information into the Run Control ID field. Enter " TEST ".
8.	Click the Add button. 



The screenshot shows the Oracle Transaction Register report interface. At the top, the Oracle logo is visible. The breadcrumb navigation path is: Favorites | Main Menu > Inventory > Manage Inventory > Reports > Transaction Register. The page title is "Transaction Register". Below the title, there are tabs for "Report Manager", "Process Monitor", and "Run". The "Run" tab is active. The "Run Control ID" field is set to "TEST". The "Language" dropdown is set to "English". Below these, there is a "Report Request Parameters" section. It includes fields for "Request ID" (TEST), "Unit" (MDJUD), "Sort Option" (Item ID), "Transaction Group" (All), and "Item ID" (All Items). There is also a "Date Option" section with radio buttons for "Today", "As of Date", and "Range". The "Range" option is selected, with "From" and "To" dates set to 10/10/2012 and 10/11/2012 respectively. At the bottom, there are buttons for "Save", "Return to Search", "Previous in List", "Next in List", "Notify", "Add", and "Update Display".

Step	Action
9.	<p>The Transaction Register page displays.</p> <p>You have several parameters that you can use to tailor the report output to meet your specific needs. You can select the sort Option.</p> <p>You can run the report for all transaction Groups (types of Transactions) or you can run the report for a specific transaction Group. Initially, the Judiciary will only use four Transaction Groups: Putaway, Issue, Adjustment Up and Adjustment Down. Additional Transaction Groups may be used in the future as additional functionality begins to be used.</p> <p>You can run the report for a single Item ID or for all Items. At the Judiciary, the number of items in the system is small enough that the report can be run for all items. At many organizations, the item list is so large that it is not practical to run the report in that mode.</p> <p>You also have several Date Parameter Options. This parameter is the reason that the Transaction Register Report is not a good candidate to be run on a schedule. The only date option that can be run against a schedule is the Today option. The other date options cannot be set dynamically. In other words, the options cannot be changed at Run Time if the report is scheduled.</p> <p>This report is recommended to be run as an Ad-Hoc report.</p> <p>Click the As of Date option.</p> 
10.	Enter the desired information into the As of Date field. Enter " 1/01/2012 " for example.
11.	Click the Save button.
	
12.	Click the Run button.
	
13.	<p>The Process Scheduler Request page displays.</p> <p>Verify that the Server Name field displays "PSUNX".</p>

Training Guide Inventory Reports

ORACLE

Home | Worklist | MultiChannel Console | Add to Favorites | Sign out

Favorites | Main Menu > Inventory > Manage Inventory > Reports > Transaction Register

New Window ? Help Personalize Page Saved

Process Scheduler Request

User ID: neil.shahi Run Control ID: TEST

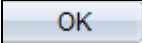
Server Name: PSUNX Run Date: 11/13/2012 Process Request Dialog

Recurrence: Run Time: 1:57:07PM Reset to Current Date/Time

Time Zone:

Select	Description	Process Name	Process Type	*Type	*Format	Distribution
<input checked="" type="checkbox"/>	IN Transaction Register	INS7100	SQR Report	Web	PDF	Distribution

OK Cancel

Step	Action
14.	Click the OK button. 
15.	Take note of the Process Instance number. For example, "Process Instance: 13441".

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Favorites | Main Menu > Inventory > Manage Inventory > Reports > Transaction Register

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Transaction Register

Run Control ID: TEST Report Manager Process Monitor Run

Language: English Process Instance: 13441

Report Request Parameters

*Request ID: TEST Unit: MDJUD

Sort Option: Item ID

Transaction Group: ☒ All ☐ Single

Item ID: ☒ All Items ☐ Single Item


Date Option

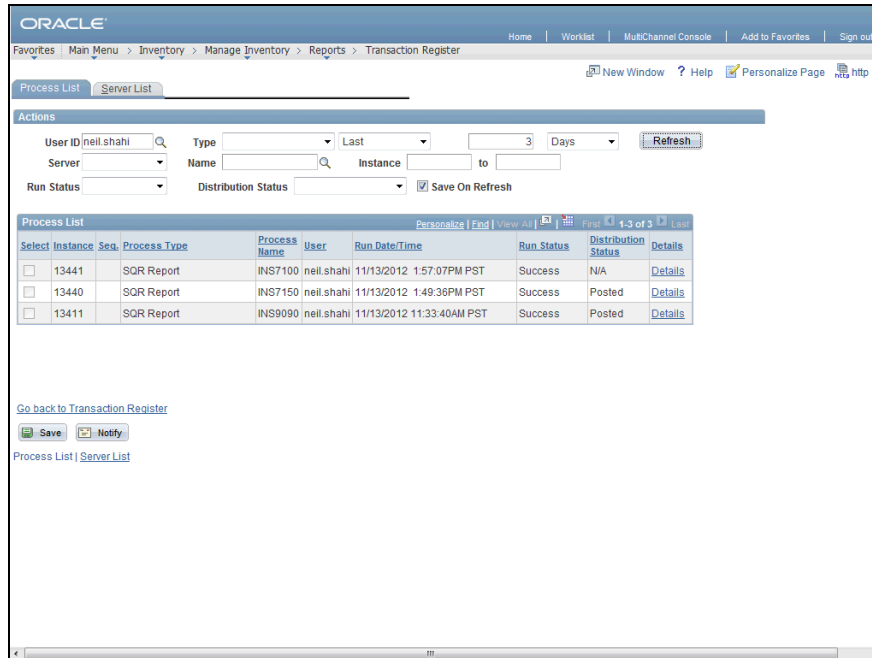
☐ Today ☒ As of Date

From: 01/01/2012 To:

Ok (Enter)

Save Return to Search Previous in List Next in List Notify Add Update Display

Step	Action
16.	Click the Process Monitor link. 



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Process List | Server List

Actions

User ID: neil.shahi | Type: | Last: | 3 Days | Refresh

Server: | Name: | Instance: | to: |

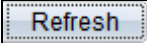

Run Status: | Distribution Status: | ☒ Save On Refresh

Select	Instance	Seq	Process Type	Process Name	User	Run Date/Time	Run Status	Distribution Status	Details
<input type="checkbox"/>	13441		SQR Report	INS7100	neil.shahi	11/13/2012 1:57:07PM PST	Success	N/A	Details
<input type="checkbox"/>	13440		SQR Report	INS7150	neil.shahi	11/13/2012 1:49:36PM PST	Success	Posted	Details
<input type="checkbox"/>	13411		SQR Report	INS9090	neil.shahi	11/13/2012 11:33:40AM PST	Success	Posted	Details

Go back to Transaction Register

Save Notify

Process List | Server List

Step	Action
17.	Click the Refresh button until the Run Status is "Success" and the Distribution Status becomes "Posted" for the process you just ran. 
18.	Click the Details link. 

Training Guide

Inventory Reports



GEARS

General Enterprise And Resource Support

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Home | Worklist | MultiChannel Console | Add to Favorites | Sign out

Favorites | Main Menu > Inventory > Manage Inventory > Reports > Transaction Register

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Process Detail

Process

Instance	13441	Type	SQR Report
Name	INS7100	Description	IN Transaction Register
Run Status	Success	Distribution Status	Posted

Run **Update Process**

Run Control ID	TEST	<input type="radio"/> Hold Request
Location	Server	<input type="radio"/> Queue Request
Server	PSUNIX	<input type="radio"/> Cancel Request
Recurrence		<input type="radio"/> Delete Request
		<input type="radio"/> Restart Request

Date/Time **Actions**

Request Created On	11/13/2012 1:57:12PM PST	Parameters	Transfer
Run Anytime After	11/13/2012 1:57:07PM PST	Message Log	
Began Process At	11/13/2012 1:57:36PM PST	Batch Timings	
Ended Process At	11/13/2012 1:57:50PM PST	View Log/Trace	

OK Cancel

Step	Action
19.	Click the View Log/Trace link. View Log/Trace

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Favorites | Main Menu > Inventory > Manage Inventory > Reports > Transaction Register

New Window ? Help Personalize Page http

View Log/Trace

Report

Report ID:	10015	Process Instance:	13441	Message Log
Name:	INS7100	Process Type:	SQR Report	
Run Status:	Success			

IN Transaction Register

Distribution Details

Distribution Node:	PSUNIX	Expiration Date:	11/20/2012
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File List

Name	File Size (bytes)	Datetime Created
SQR_INS7100_13441.log	1,501	11/13/2012 1:57:50.354974PM PST
ins7100_13441.PDF	1,615	11/13/2012 1:57:50.354974PM PST
ins7100_13441.out	64	11/13/2012 1:57:50.354974PM PST


Distribute To

Distribution ID Type	*Distribution ID
User	neil.shahi

[Index Page](#)

Return

Step	Action
20.	Click the PDF link to view the report output. ins7100_13441.PDF



Step	Action
21.	<p>The Transaction Register Report displays in a new window.</p> <p>Many of the columns on the Transaction Register Report will always be blank at the Judiciary because they relate to system features that are not planned for use here. Lot ID, Container, Staged Date and Receiver are examples.</p> <p>Serial Number may be used to track serialized forms. If the system is used that way, the serial numbers will be listed on the Transaction Register Report.</p>
22.	<p>You have successfully completed the <i>Using the Transaction Register</i> topic.</p> <p>You have learned how to:</p> <ul style="list-style-type: none"> - Use and navigate to the Transaction Register Report. <p>End of Procedure.</p>

Course Summary



Congratulations!

You have successfully completed the REP300-INV Inventory Reporting course. In this course, you have learned how to:

- Generate and review Inventory Reports

We hope that you found this class informative, interactive, and fun. Check out other GEARS training courses, available on the GEARS website at <http://courtnet/gears/index.html> (<http://courtnet/gears/index.html>).

We are always looking for opportunities to improve our courses. If you have ideas on improving this course please share your feedback by sending us an email at gears@mdcourts.gov.